



UC Extension and the California Debt and Investment Advisory Commission

Present

**FUNDING AND FINANCING OF MAINTENANCE AND PUBLIC
INFRASTRUCTURE USING
SPECIAL ASSESSMENTS**

New Approaches for Achieving Successful Outcomes

April 11, 2013-UC Davis Sutter Square Galleria, Sacramento, CA
April 25, 2013-UCLA Extension at Figueroa Courtyard, Los Angeles, CA

Agenda

In recent years special assessments have been subjected to legal challenges based on interpretations and applications of Proposition 218. The court decisions that resulted from these challenges have left communities in a state of uncertainty and led to a decline in the use of this tool to pay for public maintenance and capital improvement projects. This seminar considers the implications of the court's actions, how practicing assessment engineers and other public finance professionals have responded, and the opportunities to use assessment districts in the future.

8:30am **Registration (Morning Coffee)**

9:00am **Welcome**
Mark Campbell, Executive Director, CDIAC

Session One

9:05am **Proposition 218 and the Legal Framework of Assessment Districts in California**
Speakers will provide a summary of existing constitutional and statutory law as it relates to establishing a district and the types of facilities and services that may be funded under each statutory scheme. Bond financing options using assessments are also discussed.

Session Two

10:00am **Recent Appellate Court Decisions and What They Mean to Assessment Districts**
This session identifies the key California Supreme Court and appellate court decisions affecting districts and how each decision has changed the landscape of special assessments.

11:00 am **Break**

Session Three

11:15pm **Current Practices for Determining General and Special Benefit in AD Financing for Capital Improvement Projects**
This session addresses the structure and content of the assessment district engineer's report, identifying general and special benefits and allocating project costs to benefitted parcels. In addition, the discussion will focus on the adjustments assessment engineers may consider in identifying and quantifying special benefits in response to recent appellate court decisions. These adjustments constitute the first step towards developing a new body of "best practices."

12:30pm **Luncheon (For All Participants and Speakers)**

Session Four

1:30pm **Current Practices for Determining General and Special Benefit in Assessment Districts to Pay for Maintenance**
Speakers share new approaches being employed by assessment engineers to fund maintenance using assessment districts.

Session Five

2:45pm **When is Using a CFD a Better Choice?**
Speakers address how public agencies, public finance professionals, assessment engineers, and the development community view and approach assessment districts. This final session also covers the conditions under which using a Communities Facilities District may be a better alternative than an assessment district for funding capital improvements or municipal maintenance and/ or services.

4:00pm **Close of Seminar**

SACRAMENTO FACULTY:

Dennis Anderson, Senior Project Manager, Harris & Associates

Jim Fabian, Principal, Fieldman, Rolapp and Associates

Chris Fisher, Group Manager of Financial Services, Willdan Financial Services

Kelly Salt, Partner, Best Best & Krieger LLP

Tim Seufert, Managing Director, NBS

Elizabeth Sparkman, Senior Engineer, City of Rancho Cordova

LOS ANGELES FACULTY

Dennis Anderson, Senior Project Manager, Harris & Associates

Shauna Clark, City Manager, City of La Habra Heights

Jim Fabian, Principal, Fieldman, Rolapp and Associates

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